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GAIN Report #GM0030

Germany

Honey

Annual

2000

Approved by: **Peter O. Kurz**
U.S. Embassy, Berlin

Prepared by: Markus Frimmersdorf

Report Highlights:

Good weather allowed German apiarists to harvest 20,286 MT of honey in CY1999, a 24 percent increase over the previous year. Imports were 86,041MT, and consumption was 92,749 MT. In CY1999 China lost its status as Germany's major supplier of honey imports because of poor quality and pesticide contamination. U.S. exports to Germany increased to 751 MT.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

Germany's 1999 honey crop was 20,286 MT, compared to 16,306 MT reported in 1998, in response to very favorable weather conditions throughout this year. High imports, mainly from Argentina, Mexico and China additionally supplied to this exceptionally good German crop.

Imported honey, especially from China, got bad press coverage in 1999 as there were claims it was of poor quality and contaminated with pesticides. Consequently, China lost its prominent status as Germany's major importer to Argentina and Mexico. Despite the fact that honey from China is not being identified as imported honey and is generally mixed with honey from other sources, no negative impact on overall honey consumption was experienced. In fact, honey consumption increased to 92,749 MT in 1999 after 90,915 MT in 1998.

Honey imports in 1999 are estimated at 89,610 MT, mainly from Argentina, Mexico and China. Most of the imports arrive in Germany in containers for further processing and refilling. Imports held a market share of over 80 percent in 1999.

The German market provides opportunities for U.S. honey processors, especially if the honey is marketed in new, attractive and practical honey jars (appealing to children, for example) or plastic containers in consumer-friendly sizes.

Within the European Union (EU), imported honey (harmonized tariff code 04090000) is charged a tariff rate of 18.9 percent through June 30, 2000. There will be a tariff rate of 17.3 percent beginning July 1, 2000, onwards. In Germany, the value added tax on honey is seven percent, which is borne by the consumer/end user. Unlike the common EU tariff rates, value added taxes vary among EU member states.

Addresses

For statistical information on honey production and trade, please refer to the *German Apiarist Association*.

Deutscher Imkerbund e.V.
Villiper Hauptstraße 3
53343 Wachtberg-Villip, Germany

For trade contacts as well as in case of trade problems, please contact the *Hamburg Commodity Exchange*.

Waren-Verein der Hamburger Börse e.V.
Große Bäckerstr. 4
20095 Hamburg, Germany

Tel.: 49 40 37 47 19 0
Fax: 49 40 37 47 19 19
<http://www.waren-verein.de>
Email: info@waren-verein.de

Section II: Statistical Tables

The following section includes PSD, price table and trade matrices.

Note: Prices in tables after PSD's are in German Mark and indicate simple average monthly import prices for imported commodities recorded in the PSD's without discriminating between high-priced or low-priced products.

Note: U.S. dollar/German mark exchange rates have been as follows (according to *Handelsblatt*):

| | |
|----------------------|----------------------|
| 1991: \$1 = DM 1.66; | 1996: \$1 = DM 1.50; |
| 1992: \$1 = DM 1.52; | 1997: \$1 = DM 1.70; |
| 1993: \$1 = DM 1.65; | 1998: \$1 = DM 1.76, |
| 1994: \$1 = DM 1.61; | 1999: \$1 = DM 1.66. |
| 1995: \$1 = DM 1.43; | |

Further exchange rates are for: Euro (€)/German mark: 1 = DM 1.95583,
1 /U.S. dollar: 1 = \$ 0.9388 (7/26/2000).

Table 1: PSD for Honey (in MT)

| | | 1998 | | 1999 | | 2000 |
|------------------------|---------|---------|---------|---------|-----|---------|
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1998 | | 01/1999 | | 01/2000 |
| Commercial Colonies | 160 | 160 | 155 | 147 | 0 | 145 |
| NonCommercial Colonies | 757 | 757 | 755 | 752 | 0 | 751 |
| TOTAL Colonies | 917 | 917 | 910 | 899 | 0 | 896 |
| Beginning Stocks | 0 | 0 | 3,000 | 0 | 0 | 0 |
| Production | 16,306 | 16,306 | 13,000 | 20,286 | 0 | 15,000 |
| Imports | 93,542 | 94,793 | 87,000 | 89,610 | 0 | 90,800 |
| TOTAL SUPPLY | 109,848 | 111,099 | 103,000 | 109,896 | 0 | 105,800 |
| Exports | 13,567 | 20,184 | 12,000 | 17,147 | 0 | 18,000 |
| Domestic Consumption | 93,281 | 90,915 | 91,000 | 92,749 | 0 | 87,800 |
| Ending Stocks | 3,000 | 0 | 0 | 0 | 0 | 0 |
| TOTAL DISTRIBUTION | 109,848 | 111,099 | 103,000 | 109,896 | 0 | 105,800 |

Source: Federal Office of Statistics, German Honey Association, FAS/Berlin estimates.

Table 2: Honey Import Prices (in US\$ per MT)

| Year | 1998 | 1999 | % Change | | | 1998 | 1999 | % Change |
|------|-------|-------|----------|--|-----|-------|-------|----------|
| Jan | 1,560 | 1,530 | -1.9% | | Jul | 1,419 | 1,144 | -19.4% |
| Feb | 1,511 | 1,448 | -4.2% | | Aug | 1,355 | 1,183 | -12.7% |
| Mar | 1,461 | 1,347 | -7.8% | | Sep | 1,396 | 1,206 | -13.6% |
| Apr | 1,496 | 1,318 | -11.9% | | Oct | 1,512 | 1,211 | -19.9% |
| May | 1,426 | 1,235 | -13.4% | | Nov | 1,497 | 1,186 | -20.8% |
| Jun | 1,398 | 1,207 | -13.7% | | Dec | 1,462 | 1,117 | -23.6% |

Source: Federal Office of Statistics in Wiesbaden.

Table 3: Export and Import of Honey (in MT)

| Imports for | 1998 | | 1999 | | 2000 |
|-------------------|--------|-------------------|--------|-------------------|--------|
| U.S. | 409 | U.S. | 751 | U.S. | 800 |
| Others | | Others | | Others | |
| China | 29,455 | Argentina | 27,328 | China | 28,000 |
| Argentina | 15,458 | Mexico | 14,323 | Mexico | 14,000 |
| Mexico | 13,596 | China | 12,729 | Argentina | 10,000 |
| Turkey | 5,012 | Uruguay | 5,673 | Turkey | 6,000 |
| Uruguay | 3,395 | Romania | 4,900 | Uruguay | 5,000 |
| Romania | 2,907 | Turkey | 2,639 | Romania | 5,000 |
| Chile | 2,486 | Canada | 2,410 | Hungary | 4,000 |
| Canada | 2,529 | Hungary | 2,373 | Bulgaria | 2,000 |
| El Salvador | 2,012 | Chile | 2,209 | El Salvador | 2,000 |
| Australia | 1,895 | Italy | 2,059 | Australia | 2,000 |
| Total for Others | 78,745 | Total for Others | 76,643 | Total for Others | 78,000 |
| Others not listed | 15,639 | Others not listed | 12,216 | Others not listed | 12,000 |
| Grand Total | 94,793 | Grand Total | 89,610 | Grand Total | 90,800 |

| Exports for | 1998 | | 1999 | | 2000 |
|-------------------|--------|-------------------|--------|-------------------|--------|
| U.S. | 75 | U.S. | 82 | U.S. | 100 |
| Others | | Others | | Others | |
| Netherlands | 4,509 | France | 3,424 | Netherlands | 4,000 |
| Austria | 3,573 | Netherlands | 2,943 | Austria | 2,500 |
| France | 3,452 | Austria | 2,454 | France | 2,000 |
| Denmark | 1,688 | Denmark | 1,382 | Saudi Arabia | 2,000 |
| Great Britain | 1,337 | Belgium | 1,293 | Italy | 1,500 |
| Italy | 1,232 | Great Britain | 1,224 | Belgium/Lux | 1,000 |
| Belgium/Lux | 841 | Saudi Arabia | 946 | Denmark | 900 |
| Greece | 586 | Italy | 794 | Switzerland | 500 |
| Spain | 564 | Spain | 732 | Greece | 400 |
| Switzerland | 541 | Switzerland | 477 | Sweden | 100 |
| Total for Others | 18,323 | Total for Others | 15,669 | Total for Others | 14,900 |
| Others not listed | 1,786 | Others not listed | 1,396 | Others not listed | 3,000 |
| Grand Total | 20,184 | Grand Total | 17,147 | Grand Total | 18,000 |

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.